

Research & Study Leave Arrangements in relation to the New Agreement on Retirement Matters

Introduction

Research and study leave for faculty members continues in accordance with Article 4 and existing policies and procedures with the exception that Article 4(c) which will be amended to permit the 6 month leave after every three years of service at 82.5% to be taken within 7 years of retirement, unless the faculty member has entered the **Phased Retirement Program** in which case the leave alternative in Article 4(c) will **not** be available.

For librarians, research leave will continue in accordance with Paragraph 51 of the Policies for Librarians with the exception that Paragraph 51 will be amended to permit the 6 month leave after every three years of service at 82.5% to be taken within 7 years of retirement, unless the librarian has entered the **Phased Retirement Program** in which case that leave option in Paragraph 51 will **not** be available.

A. Retirement at Normal Retirement Date and Postponed Retirement

As stated above, research and study leave for faculty members and librarians continues in accordance with existing policies and procedures with the exceptions noted above. For example,

1. After 6 years credited service, research & study leave may be taken as
 - 6 months at 100% salary; or
 - 12 months at 82.5% salary; or
 - two 6 month split leaves at 82.5% salary
2. After 3 years credited service research & study leave may be taken as
 - 6 months at 82.5%
3. Faculty members and librarians will be required to submit a research & study leave application for approval in accordance with existing policies and procedures and must submit a written report to the Chair at the end of the leave.

B. Phased Retirement Program

If faculty members or librarians wish to apply to take an earned research & study leave during a 3 year **Phased Retirement Program**, they must apply at the time of giving notice of entering into the phased retirement so that the leave can be considered and approved in the context of the planning process for the phased retirement.

1. Faculty members or librarians in the **Phased Retirement Program** continue to earn annual credit towards a 6 year research and study leave (Article 4(a) or (b)), provided that the annual appointment is no less than 50%.
2. Faculty members or librarians entering the **Phased Retirement Program** are **not** eligible for the 3 year service research & study leave (Article 4(c) or paragraph 51 respectively)).
3. Earned leave may be taken while in the **Phased Retirement Program**. Research & study leave replaces the teaching and service commitment of either a 50% appointment or a 100% appointment. In the latter case, the faculty member earns 82.5% of salary.
4. The total appointment, including time taken as research & study leave, must remain within the 150-200% range across the 3 years. In determining the total appointment, a 6 month leave is considered equivalent to 50%; a 12 month leave is considered equivalent to 100%.
5. Leave may be deferred to the second or third year of the phased retirement with departmental, decanal and provostial approval. A 12 month research & study leave may be split into two 50% leaves with department, decanal and provostial approval.
6. Faculty members or librarians will be required to submit a research & study leave application for approval in accordance with existing policies and procedures and must submit a written report to the Chair or Chief Librarian at the end of the leave.

Example 1

At time of entering the **Phased Retirement Program** the member has accumulated 4 years credit towards the next leave.

The faculty member members or librarian must work no less than 50% in each of Years 1 and 2 in order to accumulate an additional 2 years of service credit

In the third year, the faculty member members or librarian may take 12 months research & study leave at 82.5% salary; or 6 months research & study leave at 100% salary; or 6 months research & study leave at 100% plus an additional percentage appointment. In all cases, the total of Years 1-3, including the duration of the research & study leave, must total no more than a 200% appointment. Therefore, in the event that the faculty member elected to work more than 50% in either Year 1 or Year 2, a 12 month leave in Year 3 would not be permitted.

Example 2

At time of entering the **Phased Retirement Program** the member has accumulated 5 years credit towards the next leave.

The faculty member members or librarian must work no less that 50% in Year 1 to accumulate an additional year of service credit.

In Year 2, the faculty member or librarian may take

- a 12 month research & study leave at 82.5% salary;
- or a 6 month research & study leave at 100% salary;
- or a 6 month research & study leave at 100% salary plus an additional appointment

In Year 3 the faculty member or librarian works the balance of the appointment, such that years 1, 2, and 3, including research & study leave, total no more than 200%

Alternatively: with approval, the faculty member or librarian may split a 12 month leave at 82.5% salary into two portions to be taken in Years 2 and 3.

Example 3

At time of entering the **Phased Retirement Program**, the member has accumulated 6 years credit towards the next leave.

Unless there is approval to defer the leave, the faculty member or librarian will take leave in Year 1, either

- 12 months research & study leave at 82.5%;
- or 6 months research & study leave at 100%

In Years 2 and 3 the faculty member or librarian works the balance of the appointment, such that years 1, 2, and 3, including research & study leave, total no more than 200%